FOREIGN AGRICULTURE

Experimental rice plot, PRC

Will China Be a Major Market for U.S. Farm Products?

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An experimental plot devoted to improvement of rice varieties in the People's Republic of China. Although usually a net importer of grain, the PRC at times is a major rice exporter—see article opposite.

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An Overview—PRC Agriculture And Farm Import Prospects

PRESS reports indicate that in the wake of events in the past few months, the People's Republic of China (PRC) will be placing more emphasis on economic planning and on trade with the West, including the United States.

The problem in evaluating trends in PRC trade is one of sorting out the contradictions and separating reality from speculation. Contradictions are evident in the mismatching of resources and population, enormous inequities in climate and geography, and seeming inconsistencies in trade.

The PRC's population relative to the amount of farmland within the country is an obvious mismatch. The PRC must feed and clothe almost one-fourth of the world's population from about one-sixth of the world's farmland.

There are further inequalities within the country. Because of natural factors, more than 80 percent of the population is concentrated in the eastern one-third of the country, which also contains a similar percentage of the country's farmland.

Natural diversions of climate and topography separate the PRC's eastern agricultural area into two broad segments—based on rice in the south and dryland crops, especially wheat and coarse grains, in the north. Weather conditions are more uncertain in the North China Plain.

The PRC's current Five-Year Plan places agriculture at the top of the list of priorities for investment. The Chinese hope to attain self-sufficiency in output not only of grain, but of other necessities such as cotton and oilseeds. They also want to produce sizable quantities of industrial crops for export by the final year of the plan in 1980. The plan stresses modernization of agriculture, rather than an intensification of traditional practices, to attain these goals.

The plan, in particular, calls for the basic mechanization of agriculture by 1980 and the utilization of much larger quantities of high-quality chemical fertilizer. Much of the fertilizer will be produced by 13 large chemical fertilizer plants imported from abroad, which would be in full production as early as next year. Eight of the 13 were purchased from the United States and all utilize U.S. technology. This should help boost crop yields.

Mechanization, which now consists mostly of relatively simple labor-saving equipment and tools rather than large-scale mechanization, should promote still more intensive land use and also increase crop yields. Mechanization will also assist in the construction of small water control facilities and other land improvement measures that have done so much to help stabilize and increase agricultural output since 1949.

Of course, there are formidable obstacles remaining to be overcome:

• The PRC's population is believed to be increasing by almost 2 percent a year. It is very difficult for a nation producing the quantity of grain the PRC does to regularly increase output by over 2 percent a year compounded.

• Programs to modernize agriculture could increase production substantially and possibly even produce a breakthrough, but only if modern inputs are combined in optimum proportions. The Chinese may have trouble putting the package together, especially by 1980.

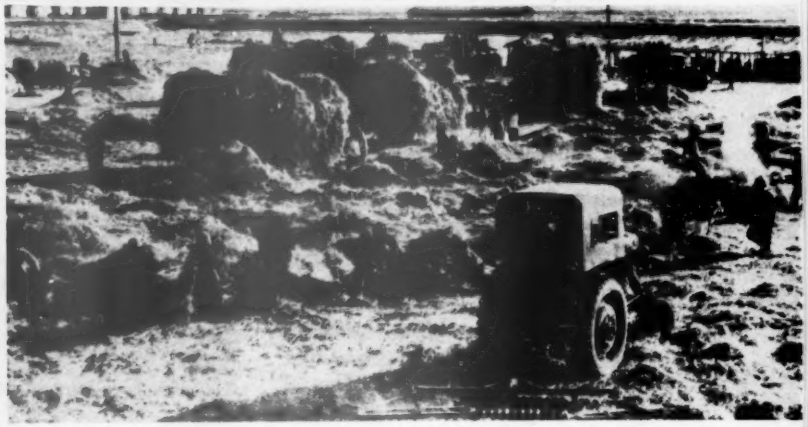
• Weather is notoriously variable and unpredictable. The Chinese are currently able to cope with drought or flood infinitely better than 25 years ago. But yields on over 60 percent of the PRC's farmland are still subject to vagaries of weather.

• Mechanization, even on a small scale, may not be compatible with labor-intensive intercropping and multiple-cropping rotations. (See article on page 4.)

Limitations of climate, soils, and topography restrict the possibility of bringing much new acreage into cultivation. Thus, increases in output must accrue, as they have in the past, primarily from more production per unit of land now under cultivation. Over the past 25 years, the Chinese have worked very hard, and output has increased. So far, however, most of the increase has

Based on remarks by Richard E. Bell, Assistant Secretary of Agriculture for International Affairs and Commodity Programs, before a Conference on China's Agriculture, sponsored by the Council for U.S.-China Trade, St. Louis, Mo., November 18, 1976.

Far left, bagged soybeans imported by the PRC—once a leading exporter of soybeans but increasingly strapped for adequate supplies of beans and oil. Left, harvesting cotton in Chinyang County, Shensi Province. Below, harvesting grain. In years of scarcity, the PRC must import large quantities of grain to meet its domestic needs, and it also is an important cotton buyer.



stemmed from more intensive land use —that is, utilizing the vast reservoir of rural labor to plant more crops per unit of farmland each year—rather than from increased yields per crop sown.

Multiple-cropping, intercropping, and other labor-intensive traditional production practices have proven successful thus far in China. But these practices produce a "one-time" increase in output, not sustained growth over a period of years.

With all these problems, it is evident that the Chinese have done very well. Famine and starvation in China are nightmares of the past. Everyone has enough food to eat and enough clothes to wear, although the Chinese recognize that they are a developing country. Moreover, imports have been required.

Until recently at least, the Chinese seem to have grown more dependent upon imports. For example, in 1956 only about 6 percent of PRC's imports by value were agricultural, while agriculture supplied about 75 percent of total exports. However, by 1975, agricultural imports, including chemical fertilizers, but excluding payments for imported fertilizer plants now under consideration in the PRC, had grown to 24 percent of total imports, while agricultural exports had declined to 54 percent of total exports.

Rice exports in 1975/76 were around 1.0 million tons—about the same as in 1956—but soybean exports had declined from almost 1.0 million tons in 1956 to about 300,000 in 1975. Cotton imports jumped from 42,000 tons in 1956 to 146,000 tons in 1975.

The PRC imported about 3.4 million tons of grain in 1975, compared with zero imports in 1956. Quantities of grain and cotton imported in 1975 were far below those of 1973 and 1974, when short crops forced Peking to purchase record quantities of grain, cotton, and even soybeans and soybean oil.

It was during that period that the PRC for the first time since 1949 purchased large quantities of U.S. wheat, corn, cotton, soybeans, and soybean oil. In 1973, the United States supplied about 55 percent of the grain, 30 percent of the cotton, 90 percent of the vegetable oil, and all of the soybeans imported by the PRC. In 1974, the United States provided almost 40 percent of the grain, 54 percent of the cotton, and all of the soybeans delivered to the PRC.

Although the United States did not share in the Chinese agricultural market in the years preceding 1972, the PRC has actually been one of the world's largest importers of wheat ever since 1961. At the same time, the country has been a leading exporter of rice. However, foreign exchange earned from the sale of rice has usually fallen far short of the cost of importing wheat and corn.

Between 1961 and 1970, the PRC purchased more wheat than any other country, and since 1970 only the USSR and Japan have imported more wheat than China. In 2 of the past 6 years, the

PRC was the leading importer of wheat, but it slipped from first place in 1974/75 to seventh in 1975/76 and is expected to be about the fifth leading importer in 1976/77.

We do not know if the recent decline in purchases of wheat and other commodities, such as cotton, soybeans, and vegetable oil, represents a downward trend or only a temporary pause. The various factors—political and economic—that determine when, how much, and from whom the Chinese buy wheat are known only in Peking. All of the commodities the PRC has imported in the past are commodities the United States can provide in large quantities and at competitive prices. The question is will the Chinese require these products in the future?

ONE THING to remember is that not all of the PRC's decisions to import are determined by domestic levels of consumption of staple foods.

- Cotton, for example, is imported, at least in part, for the manufacture of textiles, a leading export item. Import levels are partially determined by the outlook for textile exports.
- Little, if any, of PRC grain has been used for livestock feed, and although this could eventually develop, that time is probably some years away. One of the first possibilities is that the PRC might begin to import feedgrain for a limited but important animal husbandry program such as dairying.

In summary, the chances appear good that the PRC will continue to import agricultural commodities. And, if so, it is hoped we can make the Sino-U.S. agricultural trade more of a normal, regular, year-to-year flow. Among the commodities the United States has to offer, the Chinese would probably be most interested in cotton.

Regarding grain, the PRC in early November concluded an agreement for the import of 500,000 tons of Australian wheat and a Canadian wheat team will soon visit the PRC. In the past, Peking has diversified grain purchases, apparently because it does not wish to be dependent upon a limited number of suppliers. Thus, China may also buy wheat from other suppliers, and we can hope that the United States will be included among those suppliers.

All in all, there are many uncertainties in the future of agricultural trade between this country and the People's Republic of China. There are, however,

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The PRC: Asian Factor In World Grain Trade

By DONALD J. NOVOTNY
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Harvesting soybeans, PRC.

THE ROLE played by the People's Republic of China (PRC) in world grain trade is important—but more because of what it could be rather than what it has been.

Many people see this future role as an extension of past trends that include wheat imports of 3-6 million tons a year and rice exports of 1-2 million tons a year. More likely, however, are gains in PRC grain imports as the nation moves into increasingly advanced stages of development and finds practical reasons for greater participation in world trade.

This trade could develop in two ways. First, the PRC might make fuller use of imports to cover temporary crop shortfalls—thus far, done only to a limited extent. Secondly, and more importantly, trade could soon begin a more definite trend of long-term growth, possibly at a fairly rapid rate.

So far, there are few, if any, outward signs of either of these forces for increased trade, but this could be changed suddenly if, in contrast to past years, the

Based on his speech at the "1976 International Seminar on Wheat," sponsored by Great Plains Wheat, Inc., October 19, 1976, Washington, D.C.

PRC should actively begin to seek foreign trade.

Experiences with other nations show that past trends do not always indicate future prospects. Nobody could have predicted from previous performances that the USSR would buy 25 million tons of grain in a single year, or that India in 1975 would purchase 5 million tons of U.S. grain to become the biggest U.S. cash market that year.

For the PRC, it seems not a question of whether China too will surprise the world, but rather a question of when.

ARGUMENTS against increased PRC participation in world trade are numerous but debatable. People say that—

. . . the PRC's total grain production recently has become more steady, more drought proof. This also was said about the European Community until 1976, when drought forced it to purchase 30 million tons of grain from outside sources. And it was said about the United States until the poor corn crop of 1974.

. . . the PRC's foreign exchange problems will not allow it to import more grain, even if the need arose. But as far as commercial imports are concerned, the same would have been said with equal conviction about India a few years ago.

. . . even if the country needs to import more, the PRC's system will simply suppress this need. But that is the misjudgment that was made for the Soviet Union.

Some reports also give the idea that over 80 percent of the PRC's people live on farms and that their income per person remains extremely low—perhaps about equal to incomes in South Asia. Mainly because the PRC does not trade much—and because it has at least 150 million more people to feed and clothe than it did 15 years ago—many have notions that living standards are at bare subsistence levels.

The PRC's trade is now about $15 billion both ways—roughly where the USSR's was 12 or 15 years ago. Soviet imports, including grain imports, have increased by over $30 billion since then, and somehow the country has managed to export more to pay for them. Why would not the PRC be able to increase exports by $30-$40 billion over the next 15 years and—without disrupting capital goods import plans—program $5-$10 billion for agricultural imports?

In some ways, the PRC also is comparable to Japan 15 years ago. Then, the office of Wheat Associates USA, Inc., an FAS market development cooperator, was considering closing down. U.S. wheat exports to Japan were under a million tons, with growth in the market seemingly finished. Since there was little feeding of grain to animals, Japan's corn imports were small and seemed unlikely to increase much—or be permitted to increase. Japan was approaching self-sufficiency in cereals, was proud of it, and planned to keep it that way.

Japan's exports at that time were about $3 billion, and the country was running a trade deficit.

Since 1960, however, Japan's exports have grown by over $50 billion, with about $9 billion of these increased revenues used each year for farm imports.

In 1960, Japan consumed around 220 kilograms of cereals per person, plus roughly 40 kilograms of meat, fish, and eggs, with almost none of the meat fed on grain. Today, the PRC consumes around 220 kilograms of cereals per capita and around 10 to 20 kilograms of meat, eggs, and fish.

The other countries of Asia generally consume about 190 kilograms of cereals and probably no more than 10 of meat, eggs, and fish per person. The same is true for much of Latin America and Africa.

The point is that in many ways the PRC of today is a lot closer to the Japan of 15 years ago than to the poorer countries of the world. Japan's meat, fish, and egg consumption has risen by around 30 kilograms per person since 1960. USSR consumption of these items has increased by a similar amount. And the PRC's consumption might do likewise in the next 15 years.

AS IN JAPAN and the USSR 15 years ago, the PRC's supply of nongrain feedstuffs today is probably already fully utilized, which means that any gain in animal production must come mainly from grain feeding. Even without counting population growth—which will probably absorb much of the increase in domestic grain production—30 extra kilograms of animal products for 850 million people probably represents at least 100 million tons of grain. Whatever the figure—80 million, 100 million, or 120 million tons—it is enormous.

Much of this extra grain could probably be produced by the PRC. But circumstances leading to that kind of increase might also set the stage for larger PRC imports of grain. Other countries have found importing to their advantage, and the PRC probably will too.

Another similarity with Japan is the PRC's interest in small machinery, particularly hand tractors. This kind of mechanization was just beginning in Japan in 1960, and Japan now has over six times as many tractors as in 1960. In the PRC today, there is a great deal of interest in planning for a similar kind of mechanization.

The big difference between mechanization in the PRC now and that of Japan a few years ago is that in Japan it happened more by the pull of market forces, whereas in the PRC it is happening more because of plans.

The country, in short, has been laying the groundwork for a more advanced economy, and the real expansion and payoff appears to be at hand. As change occurs, labor will have to be released from the fields, with attendant emphasis on mechanization.

Advancing mechanization in agriculture indicates general economic development and a lifting of living standards. When farmworkers change to nonfarming pursuits, the levels of living of those workers and their families tend to increase. Directly or indirectly, that also translates into more and better food.

Also, experiences in other countries show a certain setback in the amount of product that can be extracted from the land when machines begin to replace people on fields and farms.

Because of its system and the frugality of its people, the PRC may be able to minimize the impact of these two results of the mechanization process. But it would be a mistake to assume that the results can be avoided entirely, or even to presume that PRC leaders would see this as advantageous.

In fact, per-acre productivity could be even more affected by mechanization in the PRC than in other countries, owing to the delicately evolved system of labor-intensive cropping now in place.

As the machines move in, even if they are small and well-designed, certainly some of the intricate balance will be disturbed. And while the result will clearly be to increase the amount of crops produced per unit of human labor, there seems almost certain to be some sacrifice in terms of the amount of crop per unit of land.

If the PRC should begin to trade more and to import more grain, there is the question of where that grain

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Sweden's Farmers Strongly Represented in New Coalition Government

- Sweden, after 44 years of political control by the Social Democratic Party—alone or in combination with other parties—is now governed by a coalition of three non-Socialist parties (Center, Moderate, and Liberal) that accounts for 180 of the 349 seats in the Riksdag.

- What are some of the implications of this political change on Sweden's farm policy and its effect on firms selling in the Swedish agricultural market?

SWEDEN'S CENTER PARTY, headed by Thorbjörn Fälldin, the new Prime Minister, is the largest in the new Government coalition. It has strong ties to agriculture and was known in earlier years—when a large part of the Swedish labor force was employed in agriculture—as the Agrarian Party.

The Center Party, traditionally supported by farmers, has expanded its political influence in recent years.

Its appeal is not only to farmers and foresters, who make up less than 7 percent of Sweden's employed population, but also to persons concerned with environmental issues, concentration of economic and social power in Stockholm, and the use of nuclear energy.

The two other parties in the new coalition (Liberal and Moderate) hold 11 Cabinet posts, compared with only eight for the Center Party. (One Cabinet member has no party affiliation.)

Thus, the two other parties may tend to neutralize the agrarian interests of the Center Party, although both of the former share with the latter a desire to improve the political climate for the Swedish business community.

On the surface, Sweden's new Cabinet might be expected to bring about a sizable boost in agricultural influence on Government decisions. Six of the 20 new Cabinet members are farmers, including one farmer's wife, and two others have strong agricultural ties. There were no farmers in the previous Cabinet, nor did any of these Cabinet members have any direct ties to agriculture.

Mr. Fälldin, for example, owns and operates a 500-acre farm—large by Swedish standards—in northern Sweden, on which he raises sheep, potatoes, and timber.

Other farmer members of the new Cabinet include:

- Anders Dahlgren, Minister of Agriculture, started his career operating a rented farm and later bought the land. He also is keenly interested in forestry matters.
- Eric Krönmark, Minister of Defense, owns and farms a farm-and-forestry operation in southern Sweden and had served on the Riksdag Agriculture Committee.
- Nils G. Asling, Minister of Industry, operates a beef cattle and grain farm in north-central Sweden. He is vice president of the Federation of Swedish Farmers and a board member of the International Federation of Agricultural Producers.
- Johannes Antonsson, Minister of Local Government, is a farmer and board member of the Federation of Rural Credit Banks.
- Elvy Olsson, Minister of Housing, is the wife of a Wodermanland farmer.

A seventh Cabinet member (for budget) spent 6 of his early adult years working on his family's farm before returning to college. An eighth (Deputy Minister of Social Affairs, which carries full Cabinet status) is the wife of a professor of forestry, and with her husband owns some 400 acres of farm and forest land.

With one exception, the farms owned by these officials tend to be family-size operations rather than larger farms. All six farmer members of the Cabinet have served for some years in the Riksdag, which requires spending a considerable portion of time in Stockholm. As a result, additional help is needed on their farms.

Minister Asling, for example, raises beef cattle, which require less labor than dairy cattle. His farm is operated by his wife and twin sons, plus a few hired hands.

GOVERNMENT assistance to small business has received marked emphasis in the Moderate Party platform. It is considered possible that a slight shift away from the consumerism of the previous Social Democratic regime may develop.

Some insights into the Government's agricultural policy were given in the Prime Minister's opening address to the Riksdag. Subsequently, some of the key points were further developed by the new Minister of Agriculture.

The Prime Minister stated that a new agricultural policy will be presented to the Riksdag—a promise suggesting the possibility of major changes. However, a nonpartisan commission has been working for several years on a new statement of national agricultural policy, and the commission's recommendations—scheduled to be completed soon—are expected to provide the essence of the new policy.

The Prime Minister has made the following points about the new policy's form and substance:

- The family farm is to be the cornerstone. This declaration is not new in practice, but has not been previously stated so precisely. It would not be surprising to see the new Government take an increasingly critical look at large-scale agri-business enterprises that produce an increasing portion of the nation's hogs, chickens, and eggs.
- Farmers are to be given economic and

social equality with other groups. Economic equality is not a new goal here. This declaration merely defines a long-standing social philosophy that crosses party lines in Sweden. Farm prices, for example, for years have been regularly adjusted to assure farm income parity with nonfarm workers' income.

The term "social equality" suggests a frontier, however. The previous Government had already begun to implement such programs as farm vacations, problems encountered when a farm operator is sick (*Foreign Agriculture*, Sept. 6, 1976), and the long hours that farmers must work—hours that may become even longer as the cost of hired labor rises.

- Increased attention will be given to the interplay between agriculture and environment, which conceivably could lead to higher farm operating costs. However, any change will be gradual.
- "Agricultural policy must, especially in northern Sweden, be regarded as part of an active regional policy," the Prime Minister has stated. This emphasis on regionalism may expand, particularly since the homes of both the Prime Minister and the Minister of Industry are located in "northern Sweden."
- Agricultural land is to be protected from undesirable nonfarm encroachments, such as factories and homes. The Government is already studying this problem.
- "Agricultural land should be used rationally . . . thereby we can secure our need for food and support the food supply of the world," the Prime Minister has stated. This is a significant expression, signifying the Government's support of a shift in farm policy that has been underway for several years.

Earlier, there were efforts to hold farm production to levels required to support domestic needs. Food prices were—and are—supported at a high level, and surpluses could be exported only with Government grants.

However, recurring world grain shortages have given impetus to Swedish farmers' desire to utilize their entire productive resources, and such utilization has become *de facto* policy. Prices are structured to channel surplus production into exportable grain rather than livestock products. Such grain exports are subsidized or used as part of the country's foreign aid program.

These points collectively suggest a slight increase in the Government's attentiveness to farmers' interests, as reflected through the Center Party. However, the implications of this attentiveness for the livestock, dairy, and grain industries (high prices, supported by import levies, prevail in these industries) are nominal.

The country's basic policy of relatively high income protection for the livestock, dairy, and grain industries was not an issue in the recent election campaign, and all parties—including the ousted Social Democratic Party—are in agreement on it.

However, there may be implications for Sweden's fruit and vegetable growers, who have always been outside the Government's protective mechanism. Although they produce only a relatively small share of the nation's fruit and vegetable needs, these producers have long clamored for additional protection from imports. About one-fourth of U.S. exports of farm products to Sweden, which in 1975/76 were valued at $96.6 million, consist of fresh or processed fruits, vegetables, juices, and nuts.

Any Center Party move toward increased protectionism for fruits and vegetables may be offset by the Moderate and Liberal Parties, which with the Social Democratic Party have long supported a generally liberal industrial trade policy. Agricultural policy in general, strongy geared toward income protection, has been a notable exception and many politicians have never felt a need to alter this trend.

—Based on dispatch from
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Thorbjorn Falldin
Prime Minister

Eric Kronmark
Minister of Defense

Anders Dahlgren
Minister of Agriculture

Nils G. Asling
Minister of Industry

Elvy Olsson
Minister of Housing

Johannes Antonsson
Minister of Local Government

Food Exporting Nations Seek Expanded Japanese Markets

By LARRY F. THOMASSON
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Tokyo

STEPPED-UP food promotion activity in Japan this year by the People's Republic of China (PRC) is pushing total food promotion spending by 30 countries in Japan during 1976 well above the estimated 1975 level. The projected rise in food promotion expenditures this year results from a resumption of Chinese participation in major exhibitions.

Exports of U.S. farm products to Japan in calendar 1975 were valued at about $3.1 billion, down slightly from approximately $3.5 billion in 1974. Australia, the second most important supplier of agricultural products to Japan, shipped about $1.4 billion worth of these products to Japan in 1975, compared with about $1.3 billion worth in 1974.

Availability of U.S. supplies of agricultural products at competitive prices is expected to continue during calendar 1976, fostered by the strong Japan importer-U.S. exporter relationships that have been developed during the past 20 years.

The trade understanding reached by Japan's Agricultural Minister Abe and former U.S. Secretary of Agriculture Butz is certain to strengthen these ties still further.

As a consequence, U.S. producers are expected to maintain their top position as suppliers of agricultural products to Japan, although the U.S. share of Japan's imports of several commodities may fluctuate.

Countries other than the United States that supply most of Japan's requirements for farm products are now emphasizing the promotion of prepared and processed foods, including wine. However, this emphasis is not expected to decrease the importance of trade teams or other activities designed to promote the sale of bulk items through Government and/or private organizations.

Among the current trends in world marketing of agricultural products to Japan, the following are noteworthy:

- Increased emphasis on point-of-purchase and consumer promotions in department stores and supermarkets.
- A larger number of foreign-trade missions visiting Japan, and many Japanese purchasing and/or inspection teams visiting other countries under auspices of foreign governmental agencies and/or private organizations.
- Increased emphasis on processed food promotions, with wine prominently featured in many of them.
- Increased tie-in promotional activities with airlines.
- A slight increase in the Japan External Trade Organization's activities to promote products from developing countries.

Summaries of recent market-development activities by countries exporting farm products to Japan follow:

Australia. Heavily dependent on agricultural exports, Australia promotes production and export of farm commodities through strong Government-industry cooperative efforts. Product marketing boards acting in coordination with the Australian Embassy Trade Office conducted many promotion activities in Japan during calendar 1975.

These activities included demonstrations, samplings, in-store promotions, and displays at hotels and department stores that placed particular emphasis on a variety of products, including processed meat, dairy products, chilled beef, fruit, honey, jam, canned soups and vegetables, confectionery, candy, wine, beer, and frozen seafood.

The Australian Wheat Board invited a number of Japanese representatives of the flour milling industry to Australia, paying travel expenses in many cases. Because of a moderate increase in promotion expenditures of Australia's various marketing boards and the International Wool Secretariat in Japan, Australia's total 1975 expenditures for agricultural promotion in Japan were maintained at the previous year's level.

Austria. Market promotion of wines, champagnes, and fruit-flavored candies was concentrated on in-store programs. However, Austria's major activity for the year was participation in the International Trade Fair in Tokyo. Future market development expenditures are expected to be maintained at the 1975 level.

Brazil. During 1975, Brazil promoted coffee at the International Trade Fair. Continued promotion of coffee in Japan is expected to be on an intermittent basis.

Bulgaria. Market promotion efforts during 1975 were concentrated on such products as wine, brandy, canned meat, dairy products, and canned fruit and vegetables. Bulgaria's major activities for the year were participation in the International Hotel and Restaurant Show and the International Trade Fair.

In addition, the Bulgarian Foods and Tourist Promotion Center (inaugurated in Tokyo in 1974) intensified its promotion activities. Future market expenditures are expected to increase beyond the estimated 1975 level.

Canada. In 1975, Canada continued to intensify its market development programs for agricultural commodities, especially for barley and feed wheat. A number of Canadian trade teams visited Japan during the year, and the Canadian Wheat Board invited major Japanese flour millers to a special training program in Canada.

Promotional activities were expanded at major department stores, supermarkets, and hotels in the Tokyo and Kansai areas, placing specific emphasis on such items as processed meat, dairy products, frozen vegetables, seafood, confectionery, jam, honey, fruit and tomato juices, soups, and wine.

Canada's market development expenditures are, however, expected to drop back if no large-scale events are sponsored.

China, People's Republic of (PRC). No major exhibition was sponsored by the PRC in Japan during 1975, although a number of minor Chinese fairs were held at major department stores and supermarkets in leading cities. These promotions were sponsored by the stores, not by the PRC.

However, a number of Chinese trade teams visited Japan to promote wine, processed meat, canned fruit and vegetables, canned seafood, frozen fruit and vegetables, poultry meat, honey, jam, confectionery, chestnuts, preserved eggs, and other food specialties. In return, Japanese purchasing and technical mis-

sions visited China. Promotion expenditures during 1975 decreased drastically from the 1974 level but are expected to increase in 1976 as participation in special promotions is resumed.

Colombia. Coffee was promoted at the International Trade Fair, and promotion of this and other commodities is expected to continue intermittently. Market development expenditures during 1976 are expected to be less than 1975's, unless special promotions are undertaken. Estimated expenditures in 1975 represented a 25 percent increase over the previous year's.

Denmark. In 1975, Denmark continued to promote wine, cheese, ham, bacon, sausages, confectioneries, and cookies by in-store sampling and spot sales at major department stores and supermarkets. Future expenditures for market development are expected to total less than those of 1975 unless special activities are scheduled.

France. During 1975 France continued special cooking demonstrations and food sampling at major department stores and hotels and at the International Hotel and Restaurant Show to promote French food products. Emphasis was on wines, processed meat, dairy products, confectionery, biscuits, candies, and fruit juices. France's 1976 market development expenditures in Japan are expected to increase modestly from the estimated 1975 level.

India. Agricultural products were promoted at the International Frozen Food Industry Exhibition, and promotions are expected to continue during 1976 on an intermittent basis. Expenditures during 1975 are estimated to be at the previous year's level.

Ireland. Promotions during 1975 featured such food products as butter, cheese, bacon, processed meats, cake, jam, and liqueur, and were accomplished through trade-team visits to Japan. Expenditures during 1976 are expected to continue at the 1975 level.

Italy. Such food products as wine, biscuits, cheese, butter, milk, fruit and tomato juices, jam, confectioneries, chocolate, and canned soup were promoted in special demonstrations, samplings, and spot sales at selected department stores and major hotels. Market development expenditures during 1976 are expected to continue at the 1975 level.

Jamaica. Coffee and rum were promoted at the International Trade Fair. Promotions during 1976 are expected on an intermittent basis.

Malaysia. Promotion on rambutans, oranges, strawberries, and mixed fruit juices was featured at the International Trade Fair. Promotion expenditures during 1975 are estimated at a level 25 percent greater than the previous year's.

Mexico. During 1975, Mexico slightly increased expenditures for market promotional activities in Japan, primarily because of participation in the International Trade Fair.

However, special emphasis was placed on demonstrations and samplings at food exhibitions where such products as tequila, avocado, banana, mango, mixed nuts, canned fruit, and other specialties were featured. Mexico's market development expenditures are expected to decrease sharply from the 1975 level unless some special promotions are undertaken.

New Zealand. Food promotional activities during 1975 were concentrated on lamb, dairy products, confectioneries, canned vegetables, honey, and seafood.

The New Zealand Meat Board continued to utilize television and other information media to promote ways of preparing and serving lamb. Market development expenditures during 1976 are expected to increase slightly over the 1975 level.

Pakistan. Agricultural products were promoted at the International Trade Fair and at an exhibition. Activities are expected to continue on an intermittent basis during 1976. Expenditures during 1975 are estimated at almost twice the 1974 level.

Philippines. Canned fruits and juices, vegetables, coconuts, wine, and brandy were featured at the International Trade Fair. Expenditures during 1975 are estimated to have increased two-fold over the previous year's total. Promotion activities are expected to continue intermittently throughout the year.

Portugal. Market promotion efforts during 1975 were concentrated on wines. Two wine-tasting parties were held, and a Portuguese trade mission visited Japan. Expenditures during the year are estimated at approximately the same level as in 1974.

Poland. After a 4-year absence of market development activity, Poland in 1975 launched an intensified market promotion program that included in-store promotions and participation in the International Trade Fair. Promotion expenditures during 1976 are expected to rise slightly above the 1975 level.

Romania. During 1975, Romania's major market promotional activities were concentrated on wines, brandies, butter, cheese, and canned fruits and vegetables. Future market development expenditures are expected to continue at the high level of the past 2 years.

Singapore. One in-store promotion for food specialties was conducted during 1975, and promotions are expected to continue intermittently.

Spain. Sherry, fruit and tomato juices, processed cheeses, and other food specialties were promoted at major department stores in Tokyo and Osaka during 1975. Unless Spain undertakes special promotions, expenditures during 1976 are expected to be maintained at the 1975 level, a sharp decrease from the previous year's total.

Sri Lanka. Marketing efforts during 1975 were concentrated on black tea, jam, and other food specialties. Promotions are expected to be carried on from time to time. Expenditures during 1975

JAPAN: VALUE OF AGRICULTURAL IMPORTS FROM SELECTED COUNTRIES
(Million dollars) [1]

Country	Calendar 1974	Calendar 1975
Australia	1,293.2	1,350.9
Austria	1.5	2.1
Brazil	258.6	383.7
Bulgaria	15.7	10.9
Canada	783.0	870.1
China, People's Rep. of	365.1	430.2
Colombia	17.1	20.4
Denmark	43.3	86.2
France	99.4	93.0
India	113.0	95.6
Ireland	3.8	7.7
Italy	13.6	13.7
Jamaica	—	3.3
Malaysia	101.5	83.3
Mexico	158.2	105.0
New Zealand	180.8	195.1
Norway	10.3	10.4
Pakistan	31.6	48.6
Philippines	274.5	647.1
Portugal	14.8	8.7
Poland	10.3	8.6
Romania	3.5	2.7
Singapore	13.1	11.3
South Africa	341.7	436.8
Spain	12.0	11.2
Sri Lanka	7.7	7.7
Sweden	13.2	32.4
United Kingdom	53.2	124.9
USSR	218.7	200.1
West Germany	75.7	67.5
United States	3,985.7	3,752.6

[1] US$1.00=Y296.7. C.i.f. (cost, insurance, freight) value.

decreased greatly from 1974's.

Sweden. During 1975, Sweden promoted such products as wines, processed meats, dairy products, confectionery items, fruit juices, and other food specialties at the Scandinavian Fair at a resort hotel. Market development activities are expected to be maintained during 1976 at the 1975 level.

United Kingdom. Market promotion activities were intensified during 1975 for such products as confectionery, biscuits, chocolate, mixed candies, fruit and vegetable juices, coffee, tea, dairy products, processed meats, jam, and canned soup through food fairs in department stores. Expenditures during 1976 are not expected to increase appreciably above the estimated 1975 level unless special promotions are undertaken.

United States. FAS continues to operate a strong Government-industry foreign market development program in Japan. In this joint effort to develop, maintain, and expand commercial markets, FAS works with nonprofit producer associations (market development cooperators) and foreign trade associations and firms (foreign cooperators).

During 1975, market development activities carried out under the FAS Cooperator program included activities by more than 20 market development cooperators.

Cooperators with offices in Japan include the American Soybean Association, National Renderers Association, Poultry and Egg Institute of America, U.S. Feed Grains Council, and Western Wheat Associates. Activity emphasis was on trade and technical servicing.

The U.S. Agricultural Attache's office and the FAS Export Trade Services Division mounted two large American food exhibits with substantial U.S. exhibitor participation and product mix—the International Hotel, Restaurant, and Institutional Show at Tokyo and the solo exhibit of U.S. food products at Osaka.

Promotion of a wide variety of U.S. food products during an American food presentation, held in cooperation with eight Japanese store groups, included participation by 35 department stores and 25 supermarkets. The U.S. bicentennial theme was featured at the two major exhibits and the in-store promotions.

USSR. The Soviet Union conducted its food promotions at major department stores and at the International Trade Fair. Products featured included wine, salmon, crab, peas, tuna, and caviar. Promotions are not expected to continue on a regular basis, and market development expenditures in 1976 are expected to drop sharply below the estimated 1975 level, if no special promotions are scheduled.

West Germany. During 1975, West Germany's promotional activities emphasized such products as wine, beer, other alcoholic beverages, dairy products, processed meats, coffee, tea, biscuits, cookies, confectionery items, chocolate, cake mixes, nuts, fruit and vegetable juices, jam, marmalade, honey, pickles, mustard, soup, seafood, diet food, diabetic foods, and baby foods.

Twenty Japanese representatives of major food and beverage handlers visited Germany to attend the International Food Industry Fair. West Germany's market development efforts are expected to be maintained and possibly increased during 1976 from the 1975 level.

Developing Countries Seek Special Treatment in MTN's

By ROBERT RIEMENSCHNEIDER
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THE LESS DEVELOPED countries of the world are making themselves heard. Believing that their trade interests should be given special and priority consideration in trade negotiations, many of the less developed countries are attempting to improve their access to the markets of industrialized countries—an attitude very much in evidence in the current round of multilateral trade negotiations (MTN) in Geneva.

During September, a U.S. trade policy team visited several developing countries in Latin America to discuss various trade issues of importance both to the United States and the developing countries. The fact that the U.S. teams currently visited only developing countries points out the importance the United States places on trade negotiations with these countries.

In 1975, U.S. agricultural exports to developing countries amounted to $7.5 billion—roughly one-third of total U.S. agricultural exports of $21.9 billion. More significantly, developing countries accounted for $6.2 billion of the $9.3 billion worth of U.S. agricultural imports in 1975; a large share of this was for tropical products.

The current round of trade talks—held under the General Agreement on Tariffs and Trade (GATT)—was formally initiated with the signing of the Tokyo Declaration in September 1973, but substantive talks did not occur until after the United States received negotiating authority in January 1975.

The latest round of trade negotiations differs from previous rounds of trade talks in many respects:

- Considerable emphasis is placed on many nontariff measures affecting world trade such as quotas, subsidies, countervailing duties, and customs formalities.
- For the first time, many developing nations that are not contracting parties to the GATT are participating in the negotiations. These countries include Mexico, the Philippines, Iran, Colombia, Ecuador, and Bolivia.
- Industrialized countries are increasingly committed to giving the developing countries priority treatment in the negotiations.

One means of achieving special treatment was the establishment of a Tropical Products Group to conduct negotiations on tropical products—an area in which nearly all developing countries have a significant trade interest. The negotiations in the Tropical Products Group are the most advanced of all negotiating groups in the MTN. The work program for the Tropical Products Group includes procedures for submittal of requests to industrialized countries from developing countries for tariff and nontariff trade concessions on commodities that developing countries believe to be tropical products.

The United States received requests from approximately 40 developing countries. Following a period of extensive bilateral consultations, the United States on March 1, 1976, tabled its

initial offers of proposed tariff concessions on items the United States deemed appropriate for negotiation in the Tropical Products Group.

Many issues have confronted the negotiators in the Tropical Products Group, including:

• The decision to negotiate on tropical products without defining them. Even though the Tokyo Declaration agreed to treat tropical products as a priority sector, it did not supply a definition of tropical products, nor has it proven possible to arrive at an internationally accepted definition of tropical products. Current U.S. legislation also does not provide a definition.

(To avoid this problem, individual industrialized countries have taken various pragmatic approaches. The United States considers only those requests concerning commodities for which developing countries supply the majority of U.S. imports. In addition, the U.S. private sector was consulted in order to ensure that domestic production and import sensitivities were taken into account.)

• The amount of reciprocal concessions the developing countries may be willing or asked to give in return for concessions offered to them by industrialized nations. The U.S. position maintains that developing countries should make contributions in every area of the MTN, consistent with each developing country's trade, financial, and developmental needs. The U.S. need for contributions from developing countries becomes apparent when one considers how much these countries benefit from U.S. duty reductions on agricultural items. In 1975, more than half of U.S. dutiable most-favored-nation agricultural imports—roughly $3.4 billion of $6.1 billion—were supplied by the developing countries.

Some developed countries have offered nonreciprocal most-favored-nation concessions or duty reductions under the Generalized System of Preferences (GSP). (GSP is a system in which developed countries unilaterally grant lower tariffs, within a limited framework, on imports of many items originating in developing countries.)

The United States does not consider GSP concessions, on the part of developed countries, to be appropriate in the MTN; the GSP was instituted as a temporary, nonreciprocal, non-negotiable, unilateral measure, outside the MTN.

The United States is guided by the commitments made in the Tokyo Declaration: ". . . the negotiations shall be conducted on the basis on the principles of mutual advantage, mutual commitment, and overall reciprocity, while observing the most-favored-nation clause, and consistent with the provisions of the General Agreement relating to such negotiations."

The U.S. position holds that an effective manner in which the developing countries can become valuable members of the world trading system is to have a stake in the operation of that system, accomplished by making appropriate contributions to the negotiations. GSP concessions by industrialized nations do not elicit these necessary contributions.

The United States, in fact, has already made more agricultural concessions to developing countries on a most-favored-nation basis than many other developed countries have made. Roughly 45 percent of U.S. agricultural imports are already duty-free, including imports of coffee, cocoa beans, bananas, and tea. In contrast, the developing countries face duties on all or some of these in the European Community, Canada, and Japan.

Developing countries are seeking priority and differential treatment not only in the Tropical Products Group, but in nearly all of the groups and subgroups of the MTN.

". . . these (developing) countries continue to seek improvements in the world trading rules to facilitate (economic) development."

The concept of special and differential treatment can be viewed as two principles—establishing negotiation procedures to ensure developing country interests receive adequate and priority considerations, and permitting the developing countries greater leeway under rules of conduct of international trade than those applied to industrialized nations.

An example of possible special negotiating rules for developing countries in the tariff group might be for developing countries to reduce tariffs on selected items of interest to the developed nations on an item-by-item basis, rather than by applying a general tariff-cutting formula to these items.

An instance of differential treatment might be an agreement on a subsidies code that would allow the developing nations, under certain conditions, to use certain types of subsidies that developed countries could not use.

Two questions have been raised by the concept of special and differential treatment:

• When does a developing country become sufficiently developed and cease to be eligible for the differential treatment afforded developing countries?

For most developing countries, this will not be an issue. However, there are a few developing nations that may not need special advantages to compete with the industrialized countries in the world trading system, so fast is their rate of development.

• What degree of contributions should developing nations give in trade negotiations?

THE TOKYO DECLARATION states that "the developed countries do not expect the developing countries, in the course of the trade negotiations, to make contributions which are inconsistent with their individual development, financial, and trade needs." The contributions each developing country makes to the negotiations should not only be based on the amount of its benefits, but should also depend on its ability to pay. Therefore, the more-developed of the developing countries should be expected to contribute more for the same amount of benefit than other developing countries. However, it is very difficult to agree on practical rules to apply this principle.

Developing country desires for special consideration of their trade interests have not diminished. Convinced that expanded trade is an avenue to economic development, these countries continue to seek improvements in the world trading rules to facilitate this development.

When the Tropical Products Group met on October 18, 1976, it reviewed the progress made in the bilateral discussions and continued the general discussions of issues facing the Group, including questions relating to the finalization of concessions. The progress of the Tropical Products negotiations can have a major influence on the attitude of the developing nations toward all areas of the MTN and their role in the international trading system.

PRC Farm Imports

Continued from page 4

some highly positive elements:

- The borders are open for trade between the two countries whenever trade is mutually advantageous. For almost a quarter century the borders were closed.
- American farmers produce commodities that the Chinese have consistently imported over the past decade and a half. These commodities are produced in the United States with great efficiency and assurance of supply.
- The desire of the Chinese to diversify suppliers would seem to favor sizable purchases from the United States, at least in some years.

PRC World Grain Trade

Continued from page 5

would come from and the pattern of buying.

A look at past trends shows the PRC as an importer of grain, mainly wheat, and a sizable exporter of rice. Imports of wheat generally have ranged between 3 million and 6 million tons annually, often making this the world's largest single importer. But there has been no particular trend either upward or downward. By comparison with other grain-importing countries, yearly purchases show a relatively high amount of variability, although not as much as for certain other countries, such as the USSR.

PRC rice exports have generally ranged from 1 million to 2 million tons per year, and the quantity seems to relate more to the attractiveness of world prices than to the domestic rice crop. The Chinese tend to associate rice exports with imports of wheat; this is mainly because rice exports, which are handled by the same trade corporation, are a major way of defraying the cost of wheat imports. But it is not a highly consistent relationship where wheat imports increase whenever it is profitable to export rice.

Temporary interruptions of the uptrend in domestic grain production, perhaps due to poor weather, still seem to be the main explanation for those years when PRC imports of grain approach 5-6 million tons.

Also, imports tend to fluctuate in line with North China's grain harvest—primarily winter wheat and coarse grains. While boasting about 20 percent of the PRC's farmland, compared with only 5 percent of total land area, this region must contend with highly uncertain weather and must feed one of the densest concentrations of people on earth.

Consequently, North China has been the main recipient of wheat imports, funneling them to Shanghai, Tientsin, Peking, and other big cities of the region. This policy has reduced the need for procuring grain from grain-deficient areas with unpredictable harvests and also has freed acreage for the production of essential industrial crops such as cotton and oilseeds.

The current low in PRC grain imports, however, seems to be neither because of poor world rice prices nor good crops at home, but rather because of recent general restraint on imports.

At this stage, it is questionable whether the PRC will continue with multiyear commitments. Perhaps it no longer wishes to be tied to one or two supplier countries. Even if world wheat supplies become tighter again in 1977/78, the Chinese possibly could purchase more efficiently if they were not tied to long-term arrangements.

The PRC might also move to change its practice of buying outside competitive trading channels. It may, especially if purchases become larger, turn more to a practice of seeking competitive offers and making negotiated purchases from individual firms. Contracts allowing optional-origin terms could also come into use.

These methods possibly could give them both better price and better delivery from the standpoint of when and where the grain is to be shipped. Should such changes occur, the effect probably would be to diversify their sources to a greater extent, and more of the grain might come from the United States.

As far as wheat is concerned, there is the additional matter of dwarf smut, whose presence in U.S. grain sold to the PRC temporarily interrupted shipments of U.S. wheat in 1973/74. It could be that the experiences gained on both sides during the 1973/74 and 1974/75 seasons would enable this matter to be handled with less difficulty in the future than at the time.

Even if the PRC should continue its fairly rigid requirements on dwarf smut, the record of steps taken in 1974 indicates that the problem is not insurmountable. Over 50 separate lots of U.S. wheat totaling about 1.5 million tons, were shipped to the PRC in 1974/75; if any shipments required fumigation before unloading, probably no more than portions of one or two ships were involved.

If and when purchases through normal competitive trading channels are resumed, there may be other aspects of contract conditions that need to be modified, but these also should not be insurmountable. During 1973/74 and 1974/75, both buyer and sellers had little experience in dealing with one another, and, for that matter, the buyer had had almost no recent experience in importing grain from sources other than Canada and Australia. It is true that contracts covering almost 1 million tons of U.S. grain were cancelled in early 1975, but these cancellations were probably mainly due to other factors.

PRC IMPORTS OF GRAIN, CALENDAR YEARS 1961 THROUGH 1976 [1]
[In millions of metric tons]

Year	Total	Country of origin					
		Canada	Australia	Argentina	France	United States [2]	Others
1961	5.56	2.26	2.57	0.37	0.26	0	0.10
1962	4.60	2.01	1.23	.53	.28	0	.55
1963	5.45	1.48	3.00	.04	.81	0	.14
1964	6.31	2.07	2.23	1.41	.23	0	.37
1965	5.91	1.60	2.80	1.50	0	0	.01
1966	5.59	2.57	1.31	1.60	.11	0	0
1967	4.94	1.08	2.86	.10	0	0	.09
1968	4.36	2.17	1.59	0	.60	0	0
1969	3.91	1.73	1.85	0	.33	0	0
1970	4.94	2.00	2.49	0	.45	0	0
1971	3.03	3.00	.03	0	0	0	0
1972	4.66	3.69	0	.03	0	.94	0
1973	7.78	2.54	.77	.15	0	4.32	0
1974	6.91	1.88	1.32	.74	.21	2.76	0
1975	3.40	1.93	1.29	.18	0	0	0
1976 [3]	2.05	1.35	.70	0	0	0	0

[1] Includes mainly wheat and corn; small amounts of barley were imported in the early 1960's. [2] Includes transshipments. [3] Preliminary.

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